

Request to Add or Remove Dependent Job Aid

Adding a Dependent

- Veterans in receipt of compensation who would like to add the following types of dependents can be processed under the following Customer Relationship Management Unified Desktop Optimization (CRM/UD-O) procedures:
 - Spouse
 - Minor biological child
 - Minor stepchild
- Veteran is rated 30% or more
- Dependent is not currently on the award

After completing the search and ID proofing for the Veteran inquirer, review the **Veteran Profile** tab to verify the dependent is not already on the award:

The screenshot displays the Unified Service Desk interface for a veteran named George Jesse. The 'ADDL TABS' menu is open, showing various tabs including 'VETERAN PROFILE', which is highlighted. The profile details are as follows:

Name:	GEORGE, JESSE
SSN / File Number:	796330163 / 796330163
Branch Of Service:	AIR FORCE (AF)
Station of Jurisdiction:	328 - Chicago
Character of Discharge:	HON
Rank:	
POA:	095 - ITALIAN AMERICAN WAR VETERANS OF THE US, INC.
DOB:	1/31/1950
Gender:	M
DOD:	
OGC Database Link:	OPEN LINK
Fiduciary Info:	
Person/Org Name:	
S/C Combined Rating:	40
NSC Combined Degree:	40
Award Type:	CPL-Compensation/Pension Live
Pay Status:	Authorized
Last Paid Date:	2/24/2022
Amount:	\$85.02
Next Scheduled Pay Date:	2/24/2022
Next Amount:	\$42.51
Pending Claims:	6 open claim(s)
Pending Appeals:	0 pending appeal(s)
Mailing Address:	32032 S BARLOW RD CANBY OR 97013
Last Phone Call History:	02/24/2022 6:03 PM Payments / Debts Payment Lost / Stolen Success
Status:	

The 'VETERAN PROFILE' tab is selected, showing the following details:

Caller First Name:	JESSE	Relationship:	GEORGE
No Phone # Avail.:	<input type="checkbox"/>	Security Pin:	(41) 520-2121
White House Veteran Hotline:	<input type="checkbox"/>	Opt-out of VBA Texts/Emails:	<input type="checkbox"/>

The 'General' section shows the Channel as 'Phone' and the Interaction Type as 'Call'. The 'Create Request' dropdown menu is open, showing options such as 'Appeals', 'Appeals Modernization', 'BVA Appeal', 'Contract Examinations', 'Claim', 'Correspondence and Forms', 'Dependent Maintenance', 'eBenefits', 'Fiduciary', and 'Incr'n'.

Request to Add or Remove Dependent Job Aid

Dependents on the Veteran's award are located in the **Dependents** tab:

The screenshot shows the 'VETERAN PROFILE' tab for a user named GEORGE, JESSE. The 'Dependents' sub-tab is active, displaying a table of dependents. The table has columns for Ptcnt ID, First, Middle, Last, SSN, SSN Verified Status, Related to, Relationship, Proof of Dependency, and Gender. There are 7 rows of data.

Ptcnt ID	First	Middle	Last	SSN	SSN Verified St...	Related to ...	Relationship	Proof of Dependency	Gender
31265701	JASON		GEORGE	102020210	Y		Spouse		
31266227	ABBY		GEORGE	777668888	Y		Spouse		
31266267	SMALL	CHEESE	BURGER	303093115	Y		Child		
31258008	JUDY		GEORGE	123121231	Y		Spouse		
31233311	WILLIAM	H	GEORGE-P...	888442222	Y		Spouse		
31233310	SUSAN	JANICE	POWELL	999331111	Y		Child		
31267939	GEORGE	A	GEORGE	222333444	Y		Spouse		

If the dependent is not listed on the Veteran's award, click on the **Interaction & Request** tab to initiate an interaction. Select **Dependent Maintenance**, select dependent **Sub Type**, and select **Create Request**:

The screenshot shows the 'INTERACTION & REQUEST' tab. The 'Select Request Type' dropdown menu is open, and 'Dependent Maintenance' is selected. The 'Select Request Sub Type' dropdown menu is also open, showing a list of subtypes. The 'Create Request' button is visible at the bottom of the sub-type list.

Select Request Type:

- Appeals
- Appeals Modernization
- BVA Appeal
- Contract Examinations
- Claim
- Correspondence and Forms
- Dependent Maintenance
- eBenefits
- Fiduciary
- FNCO
- FOIA/Privacy Act
- General Benefits Information for VBA
- Ghost Call/Disconnected Call
- Media Inquiries
- Mission Act
- General Benefits Information for VHA
- General Benefit Information For NCA
- Non VA Calls
- Novel Coronavirus
- Payments / Debts
- RAMP
- Potential Incident
- Sensitive File

Select Request Sub Type:

- Add Adopted Children
- Add Minor Children
- Add School Aged Children
- Add Spouse
- Add Spouse and Minor Children
- Add Step Children
- Dependent Verification
- Elevated/Follow-Up
- Other Dependency Related Call
- Remove Dependents
- Submitted via Form 874
- Submitted via Form 886c
- Supported Personnel Action Required

Request to Add or Remove Dependent Job Aid

The Notice of Action (NOA) statement must be read to the inquirer and populates before a dependent can be added. Read the NOA statement and click **Confirm**:

INT. HISTORY VETERAN PROFILE MESSAGE FOR CALLER CLAIMS VET. HISTORY

Message for the Caller

I am a VA employee who is authorized to receive or request evidentiary information or statements that may result in a change in your VA benefits. The primary purpose for gathering this information or statement is to make an eligibility determination. It is subject to verification through computer matching programs with other agencies.

Confirm

The **Dep. Main.** tab will open and display the **Dep. Maintenance** and **Dep. Main List.** **Dep. Main List** tab shows a list of actions associated with the Veteran:

INT. HISTORY VETERAN PROFILE CLAIMS VET. HISTORY DM LIST DEP. MAINTENANCE

CLOSE 686c WORD 686c PDF 674 WORD 674 PDF DEPENDENT VERIFICATION CANCEL

GEORGE, JESSE - Dependent Maintenance - Saved

Dependent Maintenance

DependentMaintenance... Active for less than one min. General And Dependents (< 1 Min) Summary Submitted

General and Dependents Summary Associated Documents

1 Enter Veteran's Marital Status

Marital Status --- Times Married ---

2 Manage Dependents

Dependents + New Dependent Refresh Export Dependents

SSN	First Name	Last Name	Dependent Relationship	DOB	Award Ind	Maintenance Type
999331111	SUSAN	POWELL	Dependent Child	6/14/2012	Y	System
303093115	SMALL	BURGER	Dependent Child	11/9/2021	Y	System
888442222	WILLIAM	GEORGE-POWELL	Spouse	2/15/1960	N	System
123121231	JUDY	GEORGE	Spouse	6/17/1951	N	System

Request to Add or Remove Dependent Job Aid

The **Marital Status** field is mandatory and must be filled in, even if a Spouse is not being added at point of call. Select the correct marital status from the popup menu:

The screenshot shows the 'Dependent Maintenance' form for 'GEORGE, JESSE'. The 'Marital Status' field is highlighted with a red box, and its dropdown menu is open, displaying the following options: --Select-- (highlighted in blue), Married, Widowed, Divorced, Separated, and Never Married. To the right of the dropdown is the 'Times Married' field, which is currently empty. The form is titled 'General and Dependents (< 1 Min)' and includes tabs for 'General and Dependents', 'Summary', and 'Associated Documents'.

Request to Add or Remove Dependent Job Aid

To add a new dependent, click on the plus (+) New Dependent button.

1 Enter Veteran's Marital Status

Marital Status Times Married

2 Manage Dependents

SSN	First Name	Last Name	Dependent Relationship	DOB	Award Ind	Maintenance Type
999331111	SUSAN	POWELL	Dependent Child	6/14/2012	Y	System
303093115	SMALL	BURGER	Dependent Child	11/9/2021	Y	System
888442222	WILLIAM	GEORGE-POWELL	Spouse	2/15/1960	N	System

A **New Dependent** window will open. Fill all mandatory fields (*asterisk).

General

Dependent Relationship Maintenance Type

First Name * --- Middle Name --- Last Name * ---

Dependent General Information

SSN --- DOB * ---

Marriage Information

Date * --- City * --- State * --- Country * ---

Marriage Method

Veteran Spouse Information

Spouse is Veteran Spouse VA File Number ---

If the Veteran's current spouse does not have a previous spouse:

- Click save and close at the top of the tab

If the Veteran's current spouse has a previous spouse/s:

Request to Add or Remove Dependent Job Aid

- Enter the # of times the spouse has been married
- Click save in the bottom right to populate Spouse Marital History grid
- Click + New Spouse Marital History

The new dependent will be listed in the **Dependents** list as Add. Select the next page if the added dependent is not located on the first page:

The screenshot shows the 'Dependent Maintenance' interface for 'GEORGE, JESSE'. The 'General and Dependents' tab is active. In the '1 Enter Veteran's Marital Status' section, 'Marital Status' is set to 'Married' and 'Times Married' is '3'. In the '2 Manage Dependents' section, a table lists dependents:

SSN	First Name	Last Name	Dependent Relationship	DOB	Award Ind	Maintenance Type
111111111	Margaret	George	Spouse	5/29/1959		Add
999331111	SUSAN	POWELL	Dependent Child	6/14/2012	Y	System

To add marital history for the newly added spouse, Right-click to select Refresh List or press F5 on keyboard in the **Marital Information** tab:

The screenshot shows the 'Spouse Details' section with 'Current' selected. The 'Spouse Times Married' is set to '2'. Below, the 'Spouse Marital History' section has a '+ New Spouse Marital H...' button highlighted. The table below it is empty, showing 'No data available.'

The current spouse's previous marital history will be entered by using Quick Create: Spouse Marital History

Request to Add or Remove Dependent Job Aid

Quick Create: Spouse Marital History

First Name * CURRENT SPOUSE'S

Middle Name ---

Last Name * EX SPOUSE

Marriage Start Date * 1/1/1998

Marriage Start City ST LOUIS

Marriage Start State MO

Marriage Start Country * USA

How Marriage Was Terminated Divorce

Marriage End Date 9/1/1998

Marriage End City ST LOUIS

Marriage End State MO

Marriage End Country USA

Save & Create New

Save and Close

Cancel

One previous marriage:

- Enter previous marriage information
- Click Save and Close

Multiple previous marriages:

- Enter 1st previous marriage information
- Click the drop-down arrow
- Click Save & Create New
- Enter additional previous marriage information
- Click Save and Close

The current spouse's previous marital history information will display in the Spouse Details grid

- If all information is correct- Save and Close

Note: data can be edited by double clicking the appropriate line item

Request to Add or Remove Dependent Job Aid

Spouse Details

Spouse Details **Current**

Spouse Times Married **3**

Spouse Marital History + New Spouse Marital H... Refresh

✓	Marriage Start Date ↓	First Name ↓	Middle Name ↓	Last Name ↓	Marriage Start City ↓	Marriage Start State ↓	Marriage Start Country ↓	Marriage End Date ↓	How Marriage Was Terminated ↓	Marriage
	1/1/1985	CURRENT SPOUSE	---	EX SPOUSE 3	ST LOUIS	MO	USA	1/1/1986	Divorce	ST LOU
	1/2/1983	CURRENT SPOUSE	---	EX SPOUSE 2	ST LOUIS	MO	USA	1/1/1984	Divorce	ST LOU
	1/1/1981	CURRENT SPOUSE	---	EX SPOUSE	ST LOUIS	MO	USA	1/1/1982	Divorce	ST LOU

Spouse Details

Spouse Details **Current**

Spouse Times Married **3**

Spouse Marital History + New Spouse Marital H... Refresh

✓	Marriage Start Date ↓	First Name ↓	Middle Name ↓	Last Name ↓	Marriage Start City ↓	Marriage Start State ↓	Marriage Start Country ↓	Marriage End Date ↓	How Marriage Was Terminated ↓	Marriage
	1/1/1985	CURRENT SPOUSE	---	EX SPOUSE 3	ST LOUIS	MO	USA	1/1/1986	Divorce	ST LOU
	1/2/1983	CURRENT SPOUSE	---	EX SPOUSE 2	ST LOUIS	MO	USA	1/1/1984	Divorce	ST LOU
	1/1/1981	CURRENT SPOUSE	---	EX SPOUSE	ST LOUIS	MO	USA	1/1/1982	Divorce	ST LOU

To add the Veteran's previous marital history:

- Repeat + New Dependent steps
- In Spouse Details, select Previous
- Fill in additional Date and Place Terminated fields
- Click Save and Close
- Repeat for each of the Veteran's previous marriages

Spouse Details

Spouse Details **Previous**

Date and Place Terminated

How Was Marriage Terminated * ---

Marriage End Date * ---

Marriage End City * ---

Marriage End State * ---

Marriage End Country * ---

Once all additions are completed (full martial history, remove spouse and/or, add minor or school age child), click Next.

Request to Add or Remove Dependent Job Aid

2 Manage Dependents

Dependents Delete Dependent

SSN	First Name	Last Name	Dependent Relationship	DOB	Award Ind
<input checked="" type="radio"/> 111111111	Margaret	George	Spouse	5/29/1959	
<input type="radio"/> 999331111	SUSAN	POWELL	Dependent Child	6/14/2012	Y
<input type="radio"/> 303093115	SMALL	BURGER	Dependent Child	11/9/2021	Y
<input type="radio"/> 888442222	WILLIAM	GEORGE-POWELL	Spouse	2/15/1960	N
<input type="radio"/> 123121231	JUDY	GEORGE	Spouse	6/17/1951	N
<input type="radio"/> 777668888	ABBY	GEORGE	Spouse	5/1/1970	N
<input type="radio"/> 102020210	JASON	GEORGE	Spouse	1/19/1972	N
<input type="radio"/> 222333444	GEORGE	GEORGE	Spouse	2/20/2000	N

1 - 8 of 8 (1 Selected)

Next >

Review the data on the summary page for accuracy.

Note: SSN is required for a current spouse only.

DependentMaintenance... Active for 27 minutes General And Dependents Summary (< 1 Min)

General and Dependents Summary Associated Documents

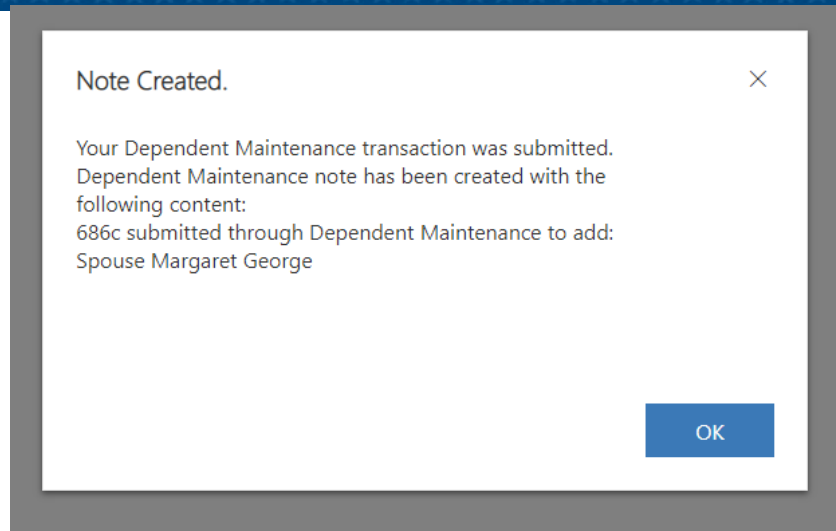
3 View Summary and Submit

Spouse Full Name	Relationship Type	Date of Birth	Last 4 of SSN	Maintenance Type
Margaret George	Dependent Spouse	5/29/1959	1111	Add

< Previous **Submit Dependent(s)**

If the addition was successful, the message below will appear.

Request to Add or Remove Dependent Job Aid



Reminder: If a note did not populate in CRM/UD-O, a required note must be entered indicating a dependent was added (i.e. Added Spouse for Joe Veteran)

Request to Add or Remove Dependent Job Aid

Removing a Dependent

After completing the search and ID proofing for the Veteran inquirer, review the **Veteran Profile** tab to verify the dependent is on the award.

The screenshot shows the 'Unified Service Desk' interface for a veteran named GEORGE, JESSE. The 'ADDL TABS' menu is open, and the 'VETERAN PROFILE' option is highlighted with a red box. The interface includes a sidebar with personal and service information, a main content area with tabs for 'INT. HISTORY' and 'INTERACTION & REQUEST', and a 'Details' section for the selected interaction.

Caller First Name	JESSE	GEORGE	Relat
No Phone # Avail.	<input type="checkbox"/>	(41) 520-2121	
White House Veteran Hotline	<input type="checkbox"/>	Opt-out of VBA Texts/Emails	<input type="checkbox"/> Secu

Dependents on the Veteran's award are located in the **Dependents** tab:

The screenshot shows the 'VETERAN PROFILE' tab for GEORGE, JESSE. The 'Dependents' sub-tab is active, displaying a table of dependents. The table has columns for Ptcpt ID, First, Middle, Last, SSN, SSN Verified St..., Related to..., Relationship, Proof of Dependency, and Gender.

Ptcpt ID	First	Middle	Last	SSN	SSN Verified St...	Related to ...	Relationship	Proof of Dependency	Gender
31265701	JASON		GEORGE	102020210		Y	Spouse		
31266227	ABBY		GEORGE	777668888		Y	Spouse		
31266267	SMALL	CHEESE	BURGER	303093115		Y	Child		
31258008	JUDY		GEORGE	123121231		Y	Spouse		
31233311	WILLIAM	H	GEORGE-P...	888442222		Y	Spouse		
31233310	SUSAN	JANICE	POWELL	999331111		Y	Child		
31267939	GEORGE	A	GEORGE	222333444		Y	Spouse		

Request to Add or Remove Dependent Job Aid

If the dependent is listed on the Veteran's award, click on the **Interaction & Request** tab to initiate an interaction. Select **Dependent Maintenance**, select **Remove Dependents** for the Sub Type, and select **Create Request**:

The Notice of Action (NOA) statement must be read to the inquirer and populates before a dependent can be removed. Once the statement has been read, click Confirm.

Message for the Caller

I am a VA employee who is authorized to receive or request evidentiary information or statements that may result in a change in your VA benefits. The primary purpose for gathering this information or statement is to make an eligibility determination. It is subject to verification through computer matching programs with other agencies.

Confirm

The **Dep. Main.** tab will open and display the **Dep. Maintenance** and **Dep. Main List**. **Dep. Main List** tab shows a list of actions associated with the Veteran:

Spouses can be removed due to death or divorce if "Award Ind" is Y

- Complete sections in number order
- Choose appropriate Marital Status and enter Times Married
- Double click the spouse

Dependent Maintenance Progress Bar

General and Dependents Summary Associated Documents

1 Enter Veteran's Marital Status

Marital Status Divorced Times Married 1

2 Manage Dependents


Dependents

SSN	First Name	Last Name	Dependent Relationship	DOB	Award Ind	Maintenance Type
288917651	MICHELLE	UDOTEST	Spouse	4/4/1985	Y	System

Request to Add or Remove Dependent Job Aid

Enter Marriage Information

Marriage Information

Date * --- 

City * --- State * --- Country * ---

Enter termination or death information

Date and Place Terminated

How Was Marriage Terminated * ---

Marriage End Date * --- 

Marriage End City * ---

Marriage End State * ---

Marriage End Country * ---

Save and close

Click Next

Review the data on the summary page for accuracy

3 View Summary and Submit

Spouse Full Name	Relationship Type	Date of Birth	Last 4 of SSN	Maintenance Type
MICHELLE UDOTEST	Dependent Spouse	4/4/1985	7651	Remove

[« Previous](#) [Submit Dependent\(s\)](#)